

Tip and Tricks for Using Folio

The following publications are currently being distributed on the State SAM II Intra-Net with an electronic distribution system called Folio:

- 1) SAM II Policies and Procedures
- 2) SAM II Chart of Accounts Guide

Folio is a system designed to publish large documents automatically to an Inter-net or Intra-Net World Wide Web server. It is designed to present a large amount of information, to a large number of users, economically by using Web browsers on each user's workstation.

This document presents some helpful hints for using the online interface provided by the Folio system.

The following topics are discussed:

- [Folio Definition of Terms](#)
- [Folio View Screens](#)
- [Basic Search Methods within Folio](#)
- [Printing from Within Folio \(using a Web browser\)](#)
- [Advanced Search Techniques Within Folio](#)

FOLIO DEFINITION OF TERMS

InfoBase: A Folio Infobase is a database of information. It is a collection of documents published as one large "publication." The SAM II Policies and Procedures is one Infobase. The SAM II Chart of Accounts Guide is another Infobase. The SAM II Infobases contain many links. When completed these links can jump to other locations within the same Infobase, to smaller more specialized Infobases, or to other online sources of information.

View: A View refers to the entire display on screen within a Web Browser. A Folio View often consists of several Windows, each with a specific purpose.

Window: In this Tips and Tricks document, a Window will refer to the smaller panes of information present within a Folio View. For example the Table of Contents appears in a Window, as does the Publication Title, the text of the Publication, and the Navigation and Search controls for each Folio View.

Query: A Query is an advanced "Search" or "Find". A Query is a set of requirements that a user defines to narrow a search to the specific information that user is looking for. A Query can be a simple phrase search like "purchase order" as shown in the example screens in this document, or can be very complex using several constraints. Many advanced search techniques are available in Folio such as Keyword, Phrase, Boolean, Wildcard, Proximity, Checked Branches, Scope, and Relevancy Ranking.

Advanced Query: An Advanced Query is a Folio Query window that gives the additional control options over a Query. It also returns a more detailed Search Report.

Record: A piece of information within a Folio Publication. A record can contain as much information as an Infobase designer would like. The SAM II staff has set the records as small as possible, to allow for more accurate search results. A record in SAM II Infobases will consist of a single line, a single paragraph, or a single table. A table can only be one record, it cannot be broken up into multiple records.

Hit: See also **Query**. A Folio Hit is a single occurrence of the requested material found by a Query. A Query will return a "Hit List". A Hit List counts the number of records containing hits. By default, each record containing at least one occurrence of the material a Query is searching for is counted as one hit. Even if more than one occurrence was found in that record, it is counted as only one hit. A record can be a line, paragraph, or an entire table (see also **Record**). Therefore, a Folio Query Hit List will only count one hit per table. By changing the partition for the search, a User can change how hits are reported, such as the number of documents or cases in the Infobase which meet the search criteria.

Hit List: A listing of all Hits resulting from a Query.

Search String: A phrase used to do a search. It consists of words and codes combined to specify to the computer what a user is looking for. An example of a simple Search String would be *purchase order*. A more complicated one might be *[Partition Heading 2] "purchase order"/10*.

Partition: A logical division of the Infobase used for returning information from a Query and for reporting search hits. Partitions are based off of the Heading Levels applied in the Infobase.

Keyword Search: A keyword search finds all records containing the word(s) a User specifies. Key words should be separated by spaces.

Phrase Search: A phrase search finds all records containing an exact phrase. The phrase to find must be enclosed in quotes.

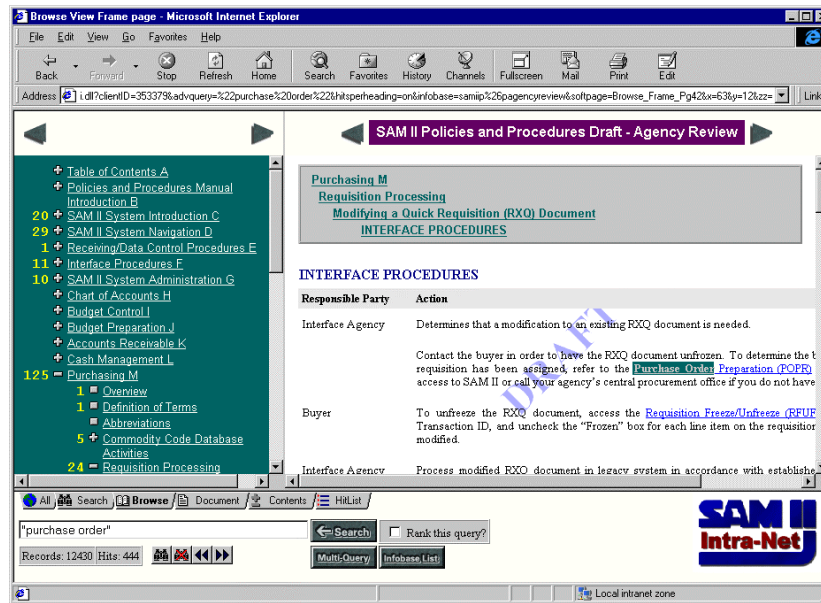
Boolean Search: A search using at least two terms separated by a boolean operator. The boolean operators are AND, OR, NOT, and exclusive or (XOR).

Relevancy Ranked Query: A query which evaluates the hits and displays them in a ranked order in the Hit List, with the most relevant records (or partitions) listed first. A User may specify the number of hits to rank, such as the 10 most important or the 100 most important.

Scope Search: When performing an action such as a Query, the scope is the areas of the Infobase selected to apply the action. For instance a user can limit the Scope of a Query to the following: Contents, Field, Group, Headings, Highlighter, Level, Note, Partition, and PopUp.

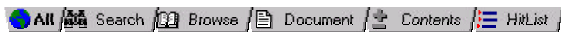
FOLIO VIEW SCREENS

When first entering the Infobase, the BROWSE View is selected.

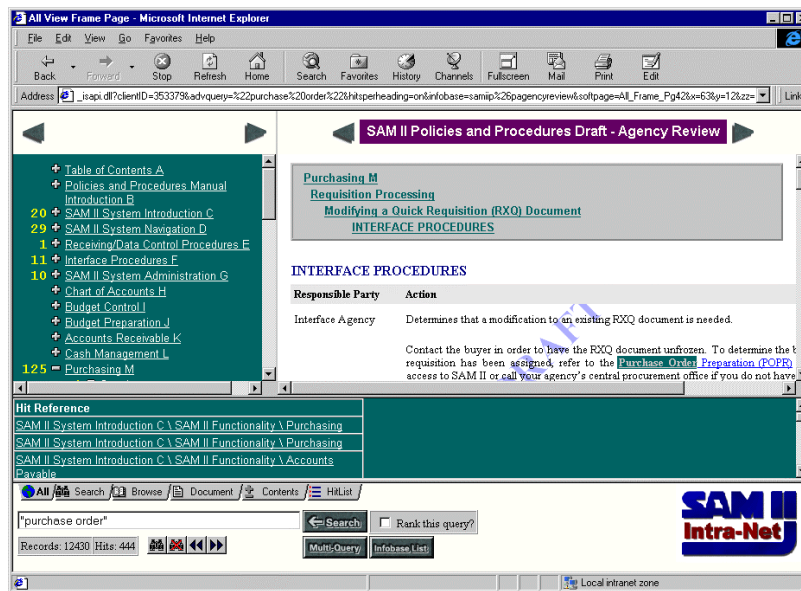


The BROWSE View is a combination of the Contents Window, the Document Window, and the Query Control Window.

Choosing the ALL Tab will change to the ALL Windows View.



The ALL Windows View combines all the Folio Windows onto one screen. This is sometimes convenient as all the information and controls provided by Folio are on the screen simultaneously. However, on most computer screens this view is very crowded. Most of the time spent using Folio will be spent in the BROWSE, CONTENTS, and DOCUMENT Views for this reason.



A User may resize the various windows by positioning the mouse directly over the window's borders, until the mouse point turns into a double arrow (\longleftrightarrow). Then hold down the left mouse button and drag. The windows will resize as the user drags the border.

THE CONTENTS VIEW

Click on the CONTENTS Tab to go to the CONTENTS View.



The following screen capture is the CONTENTS View. This view is a full screen version of the Contents Window. The Folio Table of Contents provides a complete and constantly updated hierarchical Table of Contents for an Infobase. If a Table of Contents branch has a plus (+) sign preceding it, it can be expanded to show the branches underneath it. To expand the branch, click on the (+) sign. If the branch has a block it cannot be expanded further. If the branch is preceded with a minus (-) sign, click on the minus (-) sign to un-expand (rollup) that branch.

Click on any line to go directly to that material in the Infobase.

Click the Back Button to go Back to the Previous Page

The Infobase Title

Click the Next Button to go Forward to the Next Page

Click + to Expand this Branch of the Table of Contents

The Hit Count for that Branch of the Table of Contents

Click - to Un-expand this branch of the Table of Contents

The square indicates this branch of the Table of Contents cannot be expanded further.

Click ALL Tab to go to the ALL Windows View.

Click SEARCH Tab to go to the SEARCH View.

Click BROWSE Tab to go to the BROWSE View.

Click DOCUMENT Tab to go to the DOCUMENT Screen.

Click CONTENTS Tab to go to the CONTENTS View.

Click HIT LIST Tab to go to the HIT LIST View.

Click a line to jump directly to that material in the Infobase.

The Table of Contents for the material in this Infobase.

Click on the SAM II Intra-Net logo to return to the SAM II Intra-Net.

The screenshot shows a Microsoft Internet Explorer window titled "Table of Contents: View Frame Page - Microsoft Internet Explorer". The address bar shows a URL from sam2doc.intra.net. The main content area displays a hierarchical table of contents for "SAM II Policies and Procedures Draft - Agency Review". The table lists various sections like "Accounts Receivable K", "Cash Management L", "Purchasing M", "Requisition Processing", and "Establishing a Quick Requisition (RXQ) Document". Each section is preceded by a plus (+) or minus (-) sign and a hit count. The bottom of the window features a navigation bar with tabs: All, Search, Browse, Document, Contents, and HitList. The Contents tab is currently selected. Below the tabs, there is a search bar and a "Records: 12430 Hits: 444" status bar. The SAM II Intra-Net logo is visible in the bottom right corner.

THE SEARCH VIEW

Click on the SEARCH Tab to go to the SEARCH View.



The following screen capture is the SEARCH View. This view is a full screen width document window, combined with the Hit List Window, and the Query Control Window. This document window displays the current hit(s) from the current active Query. It also displays the material surrounding the current hit. Each hit from the active Query is shown in highlighted text.

Click the Back Button to go Back to the Previous Page

The Infobase Title

Click the Next Button to go Forward to the Next Page

This area shows the Table of Contents branch where this information is located.

This window shows the material surrounding the current hit.

The Hit List Window shows a list of Hit Locations. Click any Hit to go directly to that material.

Enter your Query search phrase here.

This box indicates the total number of records in this Infobase.

This box tells the total number of hits found for this Query.

Click the Binoculars Button to open the Advanced Query Window.

Click Red X Button to clear the current Query.

Click the << button to go back to the previous hit. Click the >> button to go forward to the next hit.

Click the Multi-Query button to search all the SAM II Infobases with this Query.

Click the Search Button to start the Query's search.

Check this box to have the Search results Relevancy Ranked.

Click the Infobase List button to see a list of all the SAM II Infobases.

The results of a Query, or "Hits" are shown as highlighted text.

SAM II Policies and Procedures Draft - Agency Review

Purchasing M

Requisition Processing

Modifying a Quick Requisition (RXQ) Document

INTERFACE PROCEDURES

Responsible Party	Action
Interface Agency	Determines that a modification to an existing RXQ document is needed.

Contact the buyer in order to have the RXQ document unfrozen. Determine the buyer to which the requisition has been assigned, refer to the [Purchase Order Preparation \(POPR\)](#) table if you have access to SAM II or call your agency's central procurement office if you do not have access.

Hit Reference

SAM II System Introduction C \ SAM II Functionality \ Purchasing
SAM II System Introduction C \ SAM II Functionality \ Purchasing
SAM II System Introduction C \ SAM II Functionality \ Accounts Payable

Search View Frame Page - Microsoft Internet Explorer

File Edit View Go Favorites Help

Back Forward Stop Refresh Home Search Favorites History Channels Fullscreen Mail Print Edit

Address http://sam2doc.intra.state.mn.us/cgi-bin/vom_isapi.dll?clientID=353373&advquery=%22purchase%20order%22&hitsperheading=on&infobase=samip%26agencyreview Links

SAM II Intra-Net

Local intranet zone

The Hit List Window

When a Query is active, the Hit List Window features a clickable list of the Table of Contents paths to each hit. Click on any hit to go directly to that material.

The Query Control Window

The Query Control Window contains all the necessary tools for doing advanced searching within a Folio Infobase. This section describes the Query controls, and the search techniques available in Folio.



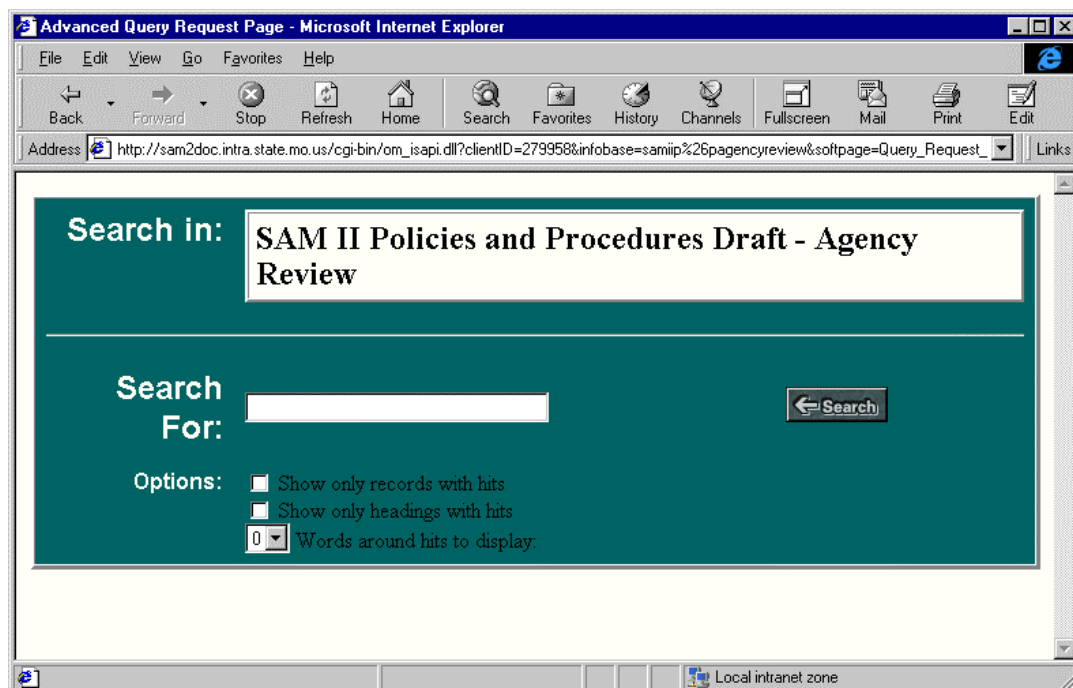
The Query Control Window interface includes a text input field containing "purchase order". To the right of the input field is a "Search" button with a left-pointing arrow. Further right is a checkbox labeled "Rank this query?". Below the input field, there are two status boxes: "Records: 12430" and "Hits: 463". To the right of these are navigation icons: a magnifying glass, a red X, and left/right double arrows. At the bottom right are two buttons: "Multi-Query" and "Infobase List".

A "Search" or "Find" in folio is referred to as a Query. To perform a query a user must specify to the computer what the user is looking for. A phrase consisting of a word or words and/or codes create what is known as a "Search String". To perform a Query in Folio type a Search String, like "purchase order", in the text box of the Query Control Window, then click the **SEARCH** button.

The Query will return a Hit List that will indicate the number of hits in each branch of the Table of Contents. It will display the total number of records in the box in the Query Control Window, and the number of hits in the box in the Query Control Windows. Each individual hit will be highlighted in the Document Window.

To perform an Advanced Query click the Binoculars button in the Query Control Window.

The Advanced Query Control View



The screenshot shows a web browser window titled "Advanced Query Request Page - Microsoft Internet Explorer". The address bar shows a URL from "sam2doc.intra.state.mo.us". The main content area has a dark green background. At the top, it says "Search in:" followed by a box containing "SAM II Policies and Procedures Draft - Agency Review". Below this is a "Search For:" label next to an empty text input field, with a "Search" button to its right. Underneath is an "Options:" section with three checkboxes: "Show only records with hits", "Show only headings with hits", and a dropdown menu for "Words around hits to display" set to "0". The browser's status bar at the bottom indicates "Local intranet zone".

The Advanced Query screen allows a user to enter complex Queries, and control the Query results. The **Options** controls adjust what the Query results, and how those results appear.. The user can limit to the viewing of information in the Document Window to only the Records, or Headings with hits. If the **Words around hits to display** is set to a value higher than zero, the Hit List will include for each hit short outtakes from the document. The outtake will include the hit, and the specified number of surrounding words.

To perform a Query from this window, type the Search String into the **SEARCH FOR:** text box, and click the **SEARCH** button. See the following section for information on formatting the Search Strings for the basic searches available in Folio. Refer to [Advanced Search Techniques](#) discussed later for the format of more advanced Search Strings.

Searching Methods within Folio

Below is a description of each type of Query available in Folio. Many of these can also be used together. (For example a Boolean search with Wild Cards.)

Keyword Queries:

A Keyword Query is simply searching for one or more words.

Search String	Results
purchase	Finds all records which contain the word purchase
purchase order	Finds all records which contain both words purchase and order (in any order within a record)
open purchase order	Finds all records which contain all three of the words open , purchase , and order (in any order within a record)

Phrase Queries:

Phrase Queries find a complete phrase exactly as typed. A phrase must be surrounded by Double Quotes ("").

Search String	Results
"purchase order"	Finds all records which contain the exact phrase "purchase order"

Boolean Searching:

The Boolean operators allow a User to refine a query to focus on more specific or more general information than may be found with a keyword word or phrase search. Boolean operators require a word or phrase on either side of the operator. For example, **dog or cat** is a valid query, but **or cat dog** is not. The exception is the **not** operator. The **not** operator can be used before a term and still be valid. For example, **not cat dog** returns the same result as **dog not cat**.

There are four Boolean operators. Some operators take precedence over others, in the following order: Not, Or, XOr, And

Operator	Example	Results
And	one two one & two one and two	Finds records containing both one and two (in any order)
Or	me you me or you	Finds every record with either of the words one or two , or both.
Not	^him not him her ^ him	Finds every record that does not contain the word him . Finds every record that does not contain the word him . Finds every record that contains her , but not him .
Exclusive Or (XOr)	apples ~ oranges apples xor oranges	Finds every record either apples, or oranges, but not both.

Wildcards:

Wild card characters can be used to search for variations of words.

Operator	Example	Results
Single Character Wildcard <i>This character means the computer will substitute any letter for a ?.</i>	wom?n g??b?r	Returns every occurrence of any five letter word starting with wom , then ANY single character, then an n . Returns every record with any six letter word starting with a g , than any two characters, followed by a b , than any single character, followed by an r .
Multiple Character Wildcard	work* h*t*	Returns every occurrence of any word starting with the four letters work , and ending in any number of any characters. Returns every occurrence of any word starting with h , followed by any number of any characters, then a t , and ending in any number of any characters.

Querying for Word Forms:

Use the word form (or stem) wildcard to find forms of a term. The parts of speech - singular, plural, past tense, present tense, future tense, etc define Word forms.

Note that there is no need to specify a root word to perform a word form search. A word form search on long (a root word) should produce the same results as a word form search on longer.

Note that the word form wildcard must appear at the end of the term. The word form wildcard may not be mixed with any other wildcards in the same term.

Operator	Example	Results
%	Work%	Finds word forms of the term work (such as work, works, or worked).
	run%	Finds word forms of the term run (such as ran, runs or running).
	"reduce% size"	Finds phrases which use forms of the word reduce (such as reducing or reduced), and the word size.

Querying for Synonyms:

Use the synonym (or thesaurus) wildcard to find synonyms of a term. Note that it is not possible to specify usage for the synonym; searching for synonyms of "address" could find both location ("What is your address?") and speech ("He addressed the audience").

The synonym wildcard is the dollar sign \$. (Since the \$ looks like an S, remember that S applies to Synonym searches.)

Note that the synonym wildcard must appear at the end of the term. The synonym wildcard may not be mixed with any other wildcards in the same term.

Operator	Example	Results
\$	Work\$	Finds synonyms of the term work (such as toil, effort, or trade).
	run\$ run%	Finds synonyms of run and word forms of run (word forms are discussed below). Synonym examples include dash, move, or track. Word stem examples include run or ran.

Printing from within Folio (Using a Web Browser)

Folio uses Web browsers as the software on each User's workstation. This means that the Web browser controls printing. The Web Browser will print whatever material Folio downloads to Document Window.

SAM II is working hard to tune the amount of information served to each User's Web browser. This document is designed to give the user some assistance in printing that material using the Web Browser's print features.

The Print Control Window:

To open the PRINT controls, choose the Menu Option: FILE/PRINT

Choose ALL to print all pages of this Web Page.
Beware: If the scroll bar is very small, this could be a LONG printout.

Use this control to select the desired printer.

Click here to change the Properties of your printer. This has no effect on WHAT will be printed from Folio.

If the Scroll Bar is very small, a user may decide to print only part of the Web Page.
This is trial and error.
The example shown here is a 60 Page Printout.
If the information to be printed is near the top, consider printing Page 1-5 or 10.
More pages can be printed as desired.

If the user wants to print a very specific part of the Web Page. Select the material in the Document Window first with the LEFT mouse button, then choose SELECTION. Only the selected material will be printed.

The Document Window Scroll Bar can give the user a hint as to the length of the document about to be printed.
The smaller this Scroll Bar is, the longer the Print Out.

The Document Window containing the information to be printed.

Reminder:
Click somewhere in the Document Window to select it prior to choosing PRINT.

This control should be set to "Only the Selected Frame".
This will tell the Web Browser to only print the currently selected Frame.

Verify that this box is NOT checked.

When all the settings are correct, click OK to begin printing.

Set the Number of Copies desired here.

Print frames:
☐ As laid out on screen
☒ Only the selected frame
☐ All frames individually

☐ Print all linked documents
☐ Print table of links

Print
Name: WDASAM\NHP LaserJet 5Si
Status: Ready
Type: HP LaserJet 5Si
Where: plaser5
Comment:
Print to file: ☐

Print Range:
☒ All
☐ Pages: from 1 to 1
☐ Selection

Copies:
Number of copies: 1
Copies: 1 2 3

OK Cancel

Document Window Content:
d Procedures Draft - Agency Review
Under \$25,000
Under \$25,000
that cost more than \$3,000 must be purchased through a
ment authority has been granted to State of Missouri
requirements of Chapter 34 RSMo for purchases valued at
need to make a purchase for supplies whose estimated total v
Determine that the total cost of the purchase for the fiscal year is more than
\$25,000. Repetitive purchases for the same supplies are not allowed if the
or exceeds \$25,000.
Determine that the supplies are not available on the existing contract. If th
an existing contract, they must be purchased in accordance with the terms
the Purchases Of An Established Price Agreement procedure.

Search **Rank this query?**
Multi-Query **Infobase List**
Records: 12430 Date: 0
Local intranet zone

Printing Techniques:

- 1) Using the Table of Contents to navigate to the beginning of the material desired works best, however a user may also print the results of a search.
- 2) A useful indicator to assist in judging the length of the document downloaded is the size of the Scroll Bar on the Document Window. A very small Scroll Bar indicates a very long document, and therefore a user could get many pages if ALL the material is printed. Point 4 describes printing ranges of pages, if a user can estimate approximately the page numbers desired, this option works well. If no reliable estimation is possible, consider either printing ALL the material, or selecting the material desired with the mouse, and printing by SELECTION as described in Point 5.
- 3) To print all the material downloaded by Folio.
 - Click in the Document Window to select the Document Window as the Currently Selected Frame.
 - Choose the Menu option PRINT/FILE.
 - Verify that the PRINT RANGE is set to ALL.
 - Verify that the PRINT FRAME is set to ONLY THE SELECTED FRAME.
 - Verify the PRINT ALL LINKED DOCUMENTS, and the PRINT TABLE OF LINKS boxes are NOT checked.
 - Set the desired number of copies, and click on OK.
- 4) To print only the certain pages of the material downloaded by Folio.,
 - Click in the Document Window to select the Document Window as the Currently Selected Frame.
 - Choose the Menu option PRINT/FILE.
 - Set the PRINT RANGE to PAGES, and set the first and Last Page to be printed. This is trial and error unless the user has printed the document before.
 - Verify that the PRINT FRAME is set to ONLY THE SELECTED FRAME.
 - Verify the PRINT ALL LINKED DOCUMENTS, and the PRINT TABLE OF LINKS boxes are NOT checked.
 - Set the desired number of copies, and click on OK.
- 5) To print only a specific part of the material downloaded by Folio.,
 - Click in the Document Window to select the Document Window as the Currently Selected Frame.
 - Choose the material to be printed by selecting it with the LEFT mouse button.
 - Choose the Menu option PRINT/FILE.
 - Set the PRINT RANGE to SELECTION.
 - Verify that the PRINT FRAME is set to ONLY THE SELECTED FRAME.
 - Verify the PRINT ALL LINKED DOCUMENTS, and the PRINT TABLE OF LINKS boxes are NOT checked.
 - Set the desired number of copies, and click on OK.
- 6) If a large amount of information needs to be printed, consider contacting State Printing and ordering a hard copy where available. See the SAM II Web Page for more information.

Advanced Search Techniques Within Folio

Proximity Queries:

Proximity searches allow a User to specify how close two (or more) words must be to each other in order to register a hit. The User may specify word proximity, sentence proximity, paragraph proximity, or record proximity searches.

Ordered Proximity - Use ordered proximity to specify the order in which terms must appear within a given range to count as a hit. This is more restrictive than the unordered proximity search. Terms in an ordered proximity search must be enclosed in quotes.

Unordered Proximity - Use unordered proximity to specify a set of terms, which must appear within a given range in any order. Terms in an unordered proximity search must be enclosed in quotes.

Record Proximity - Record proximity allows the specification of the maximum number of records between terms. For example, the system could perform a record proximity search for the terms Smith, Wesson, and revolver within a 5 record range. All three terms must appear within a five contiguous record set to count as a hit. Terms in a record proximity search must be enclosed in quotes.

Sentence Proximity - Sentence proximity allows a User to search for terms, which fall within the same sentence. Unlike word or record proximity, which require the specification of a range for the search, sentence proximity requires that all terms in the search be found in the same sentence. By default, a record in an infobase is assumed to be a sentence for sentence proximity searches. Sentence proximity searches may be ordered or unordered, just as word proximity searches are.

Paragraph Proximity - Paragraph proximity allows a User to search for terms, which fall within the same paragraph. Unlike word or record proximity, which require the specification of a range for the search, paragraph proximity requires that all terms in the search be found in the same paragraph. By default, every record in an infobase is assumed to be a paragraph for paragraph proximity searches. Paragraph proximity searches may be ordered or unordered, just as word proximity searches are.

Proximity Type	Operator	Example	Results
Ordered	/	"united states of america"/10	Finds records, which contain these four terms, in order, within a 10-word range.
Unordered	@	"uncle sams army"@7 "work* process\$">@25	Finds records, which contain all three terms, in any order, within a 7-word range. Finds records, which contain terms starting with work and synonyms of the term process within 25 words of each other.
Record	#	"smith jones theft deny"#5	Finds records, which contain these terms within a 5 record range.
Sentence	S	"purchase order"/s "closed purchase order"@s	<i>Ordered</i> - Finds records containing both terms, in the order listed, within a single sentence. <i>Unordered</i> - Finds records containing all three terms, in any order, within a single sentence.
Paragraph	P	"special proximity codes"/P "paragraph searches"@P	<i>Ordered</i> - Finds records containing all three terms, in the order, listed, within a single paragraph. <i>Unordered</i> - Finds records which contain both terms, in any order, within a single paragraph.

Scope Searches:

By default, a query searches the entire Infobase. However, searching a sub-set of the Infobase can be accomplished by changing the scope of the search.

A User may search for all occurrences of a particular scope (such as all notes or all applications of a specific highlighter) by not including terms in the query. This concept applies to notes, popups, highlighters, fields, and groups.

Searching for a level with no terms specified locates all headings at that level.

Searching for a Contents heading with no other query specified finds all records within that heading.

Example	Results
[Note]	Finds all notes in the Infobase. In SAM II this will be useful for locating all Revision Notes
[Highlighter Errors]	Find all applications of the highlighter named Errors.
[Level Heading1:]	Finds all Heading1 (Functional Area Titles, COA Element Titles) in the Infobase.
[Contents Purchasing]	Finds all records in the Purchasing Policies and Procedures.

Note - The Note scope searches all the notes in the Infobase.

Highlighters - The Highlighter scope allows a search for information highlighted in the Infobase.

The general syntax for highlighter queries is:

[Highlighter <highlighter name>: <terms, phrases, operators, wildcards>]

The <highlighter name> is the name of the highlighter to be searched. A User may optionally search for terms and phrases and use operators and wildcards within the highlighter.

Contents - The Contents scope searches a specific section of the Infobase, such as Purchasing. The scope of the search is limited to the specified section; all hits will be contained within the section. The general syntax for contents queries is:
[Contents <heading path>] <query>

The <heading path> consists of the table of contents headings separated by commas. The <query> is the search desired in the specified section. The <query> may contain any query options except another contents query, partition, or rank.

Example	Results
[Note "Purchase Order"]	Finds all notes containing the phrase 'Purchase Order'.
[Contents Purchasing] "Purchase Order"	Finds all occurrences in the Purchasing Section, which contain the phrase "Purchase Order".
[Highlighter Oedipus Complex: hamlet freud or "oedipus rex"]	Searches all Oedipus Complex highlighters for either hanlet freud or the phrase "oedipus rex".

Scope Searches (Continued):

Headings -

The Headings scope allows a search to a specific sub-section of the Infobase without having to specify the full path to that section. It also provides more flexibility in what is searched than the Contents scope allows.

For example, using a Contents query, a User can search Genesis, Chapter 12. However, the User can not easily search all Chapter 12s in the Infobase (such as Exodus 12, Leviticus 12, Judges 12). To do so using a Contents query would require that typing the full path for each Chapter 12 — a cumbersome task at best.

Heading queries allows this type of search. With a heading query, a User may narrow the scope similar to a Contents query, but without starting at the top of the Infobase. Heading queries require that a User begin by specifying the level that the first heading is on and then optionally specify the heading path beneath that level. Following the heading scope, the User may optionally specify the query to perform in the applicable sections. The general syntax for heading queries is:

[Headings <level name>,<heading path>] <query>

The <heading path> consists of the table of contents headings (starting at the specified level) separated by commas. The * wildcard may be used to skip headings; if the heading level is skipped in the infobase, do not use a wildcard — simply add another comma and the next heading. The <query> is the search to perform in the specified section. The <query> may contain any query options except partition or rank.

Example	Results
[Headings chapter] israel solomon	Finds every chapter in the Bible (ignoring text prefacing books or testaments) for Israel and Solomon.
[Headings year,1995,*,Happenings in Hyperspace]	If a User were searching a collection of articles organized by Publication Name, Year, Month, and Article Name, and if the User wanted to see any with the article titled Happenings in Hyperspace in 1995 (requiring skipping the month heading).
[Headings year,1995,,Happenings in Hyperspace]	If a User were searching the same collection described in the previous example, and if it was not known if the month level were applied, it could be skipped with this query:

Levels -

The Level scope allows a User to change the proximity of searches from records to the specified level. By default, all queries search for hits within records. Every record that is counted as a hit must meet the criteria of the query. However, with the level scope, a User may search for chapters or documents, which meet the criteria of the query.

The general syntax for level queries is:

[Level <level name>: <query>]

The <level name> is the name of the level a User wishes to set the proximity to (such as Functional Area or Business Process). The <query> is any query option except another level query, contents query, partition, or rank.

For example:

Example	Results
[Level chapter: purchase order]	This query must find both terms "purchase" and "order" within a single chapter. The terms do not all have to be in the same record.

Tip: Set the partition of the query to the same level being searched in the level query. Doing so reports the number of partitions (such as the number of cases) with hits.

Example	Results
[Level Book:[Heading Chapter,12]]	A level query containing a heading query. Use this functionality to search for a particular set of information within a specified level proximity.
[Level Chapter: a not b]	The search for finds Chapters, which contain a but which do not contain b.

Note: The XOr xor operator cannot be used in level queries. The OR operator cannot be used between the first two terms in a level query. For example, [Level Chapter: dog and (cat or mouse)] is allowed; [Level Chapter: cat or mouse] is not.

Setting a Partition

The default search partition for an Infobase is the record. When performing a search, the results are reported as a number of records with hits. However, in some instances, this reporting is too granular. A User may not want to know how many records have hits, but how many sections or chapters or cases or articles of an Infobase contain hits. By changing the partition for a search, this can be done.

Partitions are based off of levels applied in the Infobase. When specifying a partition, identify the level name to key off of.

Example	Results
[Partition Heading1] purchase order	Find all Functional Areas (Heading1) which mention purchase order. This sample query reports the number of partitions that mention both purchase and order (the proximity of the search is expanded, as it is with levels). This search requires only that both terms be contained within the partition boundaries.

Partitions divide the infobase at the specified level. However, to ensure that valid hits are not missed, if there are records above the specified partition, those records are assumed to be their own partition for searching purposes. For example, consider the following infobase:

1	Section 1	
2		Normal level records
3	Book 1	
4		Normal level records
5	Chapter 1	
6		Normal level records
7	Chapter 2	
8		Normal level records

If the partition is set to Chapter, then the following lines would be considered a partition:

1-2; 3-4; 5-6; 7-8

Note that the levels above the defined partition are counted as a separate partition for the search.

Reserved Characters & How to Handle Them

If the names of levels, groups, or other scopes contain one of the following reserved characters, these must include the entire name of the field, level, group, etc. in single quotes:

[]
*	?
/	,
\$	%
&	
^	~
:	#

Example	Results
[Highlighter 'Test/Review']	A search in the Highlighter Test/Review .
[Level 'MegaBuck\$']	A search based on Level MegaBuck\$.

Ranking Queries

Ranked searches are provided most easily by the simple Query dialog. However, power may wish to perform their own ranked searches. Ranked searches sort the hits by relevance. The ranking appears in the Hit List pane. This ranking allows the user to find the most (or least) relevant information quickly, rather than sorting through every hit in the Infobase.

When performing a ranked search, specify the maximum number of ranked records (or partitions) desired. This allows the creation of a top ten list (or a top one hundred list) of the most relevant information pertaining to the search.

To create a ranked search, type in the following syntax:

[Rank N]

where N is the number of ranked records desired.

Example	Results
[Rank 10] relevance rank query	Returns the ten most relevant records pertaining to the query specified.

The following query options may be used as part of a ranked search:

term (including wildcards)

word proximity (including phrases)

highlighter (must specify at least one term in the highlighter)

note (must specify at least one term in the note)

popup (must specify at least one term in the popup)

Or operator (|)

Note that simply ranking a query does force term expansion (as with the Query dialog). Using the word stem or synonym wildcard, provides greater or narrow term expansion for ranking than the Query dialog does.

Note: The And, Not, and Xor operators may not be used in a ranked query. The Or operator symbol (|) may be used.

Note: A partition, if used, must be specified before rank.

Setting the Domain of a Ranked Query

While query theoreticians can expound on the use of domains in ranked queries, for the typical user, there are two primary uses:

- Ensuring that a particular term or set of terms are included in all hits found by a ranked query.
- Limiting the scope of the query to a sub-set of the Infobase.

To set a domain, specify a standard query (non-ranked), using any of the standard operators, wildcards, and scopes. All of the records found by this query are gathered into a single set. The ranked query is then applied to the set.

In practice, a User could specify a set of terms in the domain that must appear in any search hit. For example, if the User is searching an Infobase of space history, the User might set the domain to include apollo and then do a ranked search for space flight missions and moon. All ranked hits are then forced to include the term apollo.

Or, a User could set the domain to a specific section of the Infobase using a Contents search. Only records, which appear in a particular section of the Infobase (such as Chapter 21), are ranked. The User must use Domain if including a scope in the query is desired.

To set a domain, type in the following syntax (it is not provided interactively from the Advanced Query dialog):

[Rank N] [Domain : <query>]

Note that Domain is only valid after Rank.

Example	Results
[Rank 10] [Domain : rank query] advanced	Returns the 10 most relevant records from the set of records in the Infobase, which contain both rank and query.
[Rank 15] [Domain : [Headings Chapter,Advanced Query]] relevance rank	Returns the 15 most relevant records in the chapter Advanced Query pertaining to relevance rank.
[Rank 20] [Domain : [Contents Bible,Old Testament,Exodus]] pestilence death and moses	Returns the 20 most relevant records pertaining to the query in the book of Exodus in the Old Testament of the Bible.

Setting the Weight of an Item in a Ranked Query

Ranked queries look at several different criteria to determine what information is relevant and what information is more relevant than other information. If necessary, a User can affect the outcome of a ranked search by giving a particular term or field a higher weight (or multiplier). Records containing weighted terms are given a correspondingly higher score and higher relevance value.

One use of weighting might be when searching a library card catalog to give the Title field of a search a higher relevance value than the Subject field. To set the weight for a term, type the following syntax as part of a ranked query:

[Weight V: <items to rank>]

where V is an integer indicating the weight desired for the specified items (the default weight is 1; a weight of 2 indicates that the item is twice as important as other items; the maximum weight is 9999). <items to rank> may be one or more of the following:

term (including wildcards)

proximity (including phrases)

highlighter (must specify at least one term in the highlighter)

note (must specify at least one term in the note)

popup (must specify at least one term in the popup)

Example	Results
[Rank 10] [Weight 2: relevance] rank query	Indicates that records containing only the term relevance will be given a higher relative score than those containing only rank or query. (The final rank is a composite of several factors, including the frequency of a term in a record and the total number of specified query terms found in the record).
[Rank 15] [Weight 2 : relevance] [Weight 4 : rank query] advanced	Indicates that records containing only the term relevance will be given a higher relative score than those containing only the word advanced. Records containing the terms rank or query will be given double the relative score of the term relevance. Note that more than one weight may be specified in a single query: